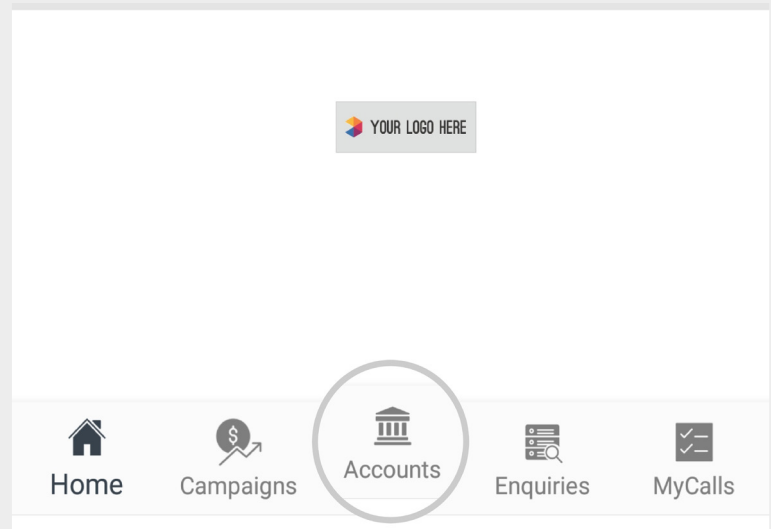


HOW TO CREATE AND SAVE AN ACCOUNT SEARCH - ANDROID

You can save time by creating and saving Account searches, so that each time you log in to sales-i you can find key accounts that match a certain criteria, without having to do repeat searches. For instance (and for the purposes of this example) you can search for a particular Sales Rep's accounts and save it.

01 From the home screen, tap on **Accounts**.



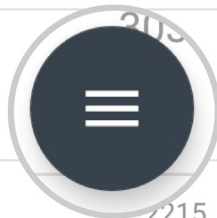
02 Tap on the **three lines icon**.

Image Office Systems
BARE DRUG, 102 8TH ST, BELLE PLAINE, IA, 52208

Ashford Printers 1670

WHITE MOUNTAIN APACHE TRI, HIGHWAY 73 & MAIN STREET, WHITERIVER, AZ, 85941

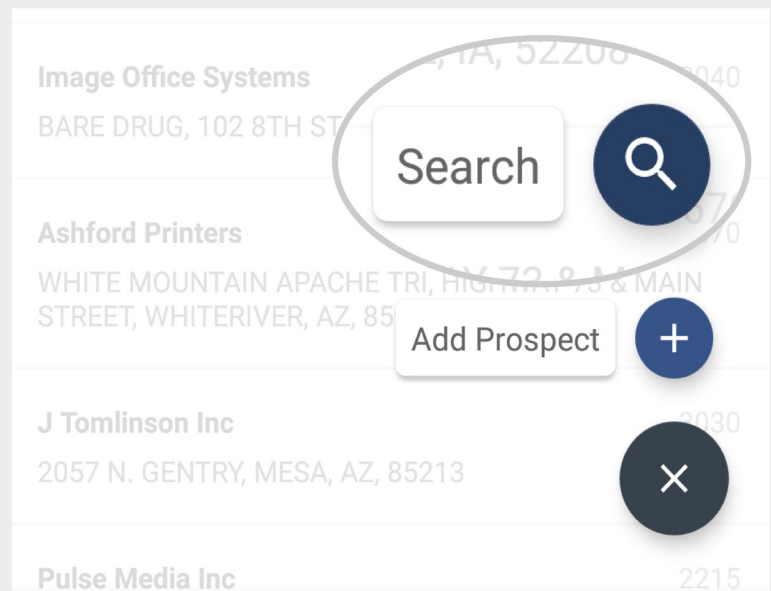
J Tomlinson Inc
2057 N. GENTRY, MESA, AZ, 85213

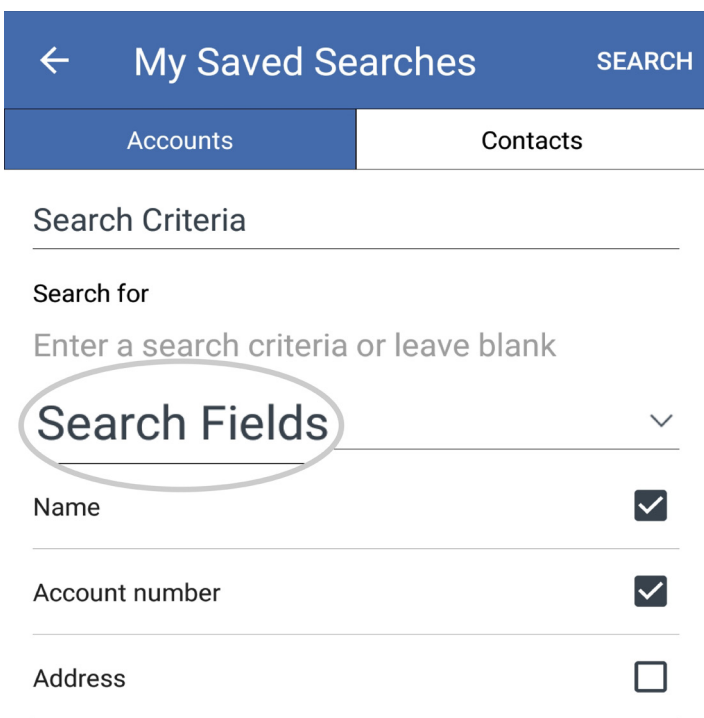


Pulse Media Inc 2215



03 Tap **Search** to open up a list of search options.

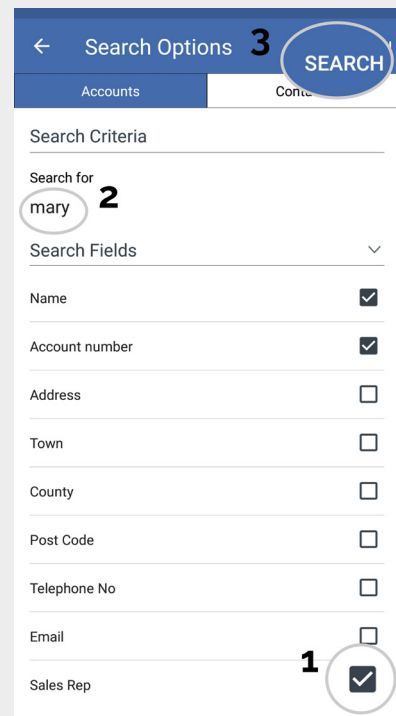




04 Next, tap **Search Fields** to open up a further list of search options.

05 For our example we will check the **Sales Rep box**, then search for our Sales Rep by typing their name underneath the **Search For** field.

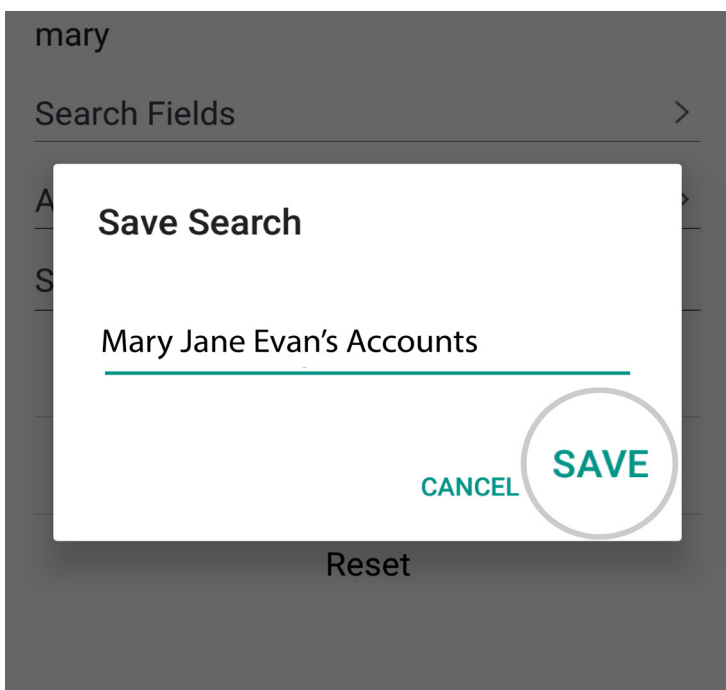
Once you are ready, tap **Search** in the top right of the window.

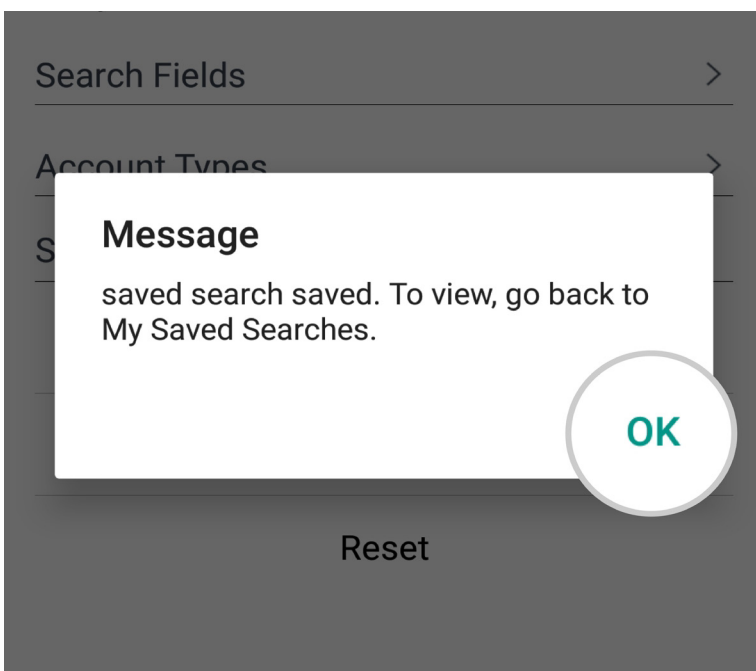


06 You now need to enter a name for your saved search.

Please Note: The name should be something that will make sense when you or someone else looks for at a later date. In this example we will enter 'Mary Jane Evan's Accounts'

Next, click **Save**.





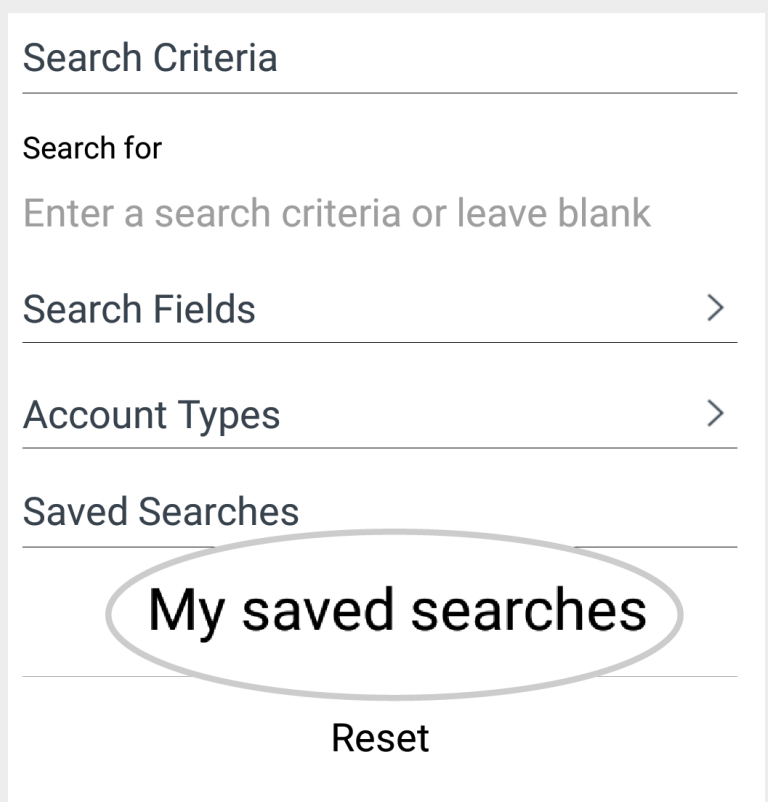
07 A box will now pop up to let you know your search has been created.

Tap **OK**.

08 Now that you have saved your search, you can access it easily any time you need to.

Simply, follow steps 1 - 3 of this guide and click **My saved searches**.

Select your Saved Search to display it.



VISIT OUR SUPPORT SITE

Don't forget to visit our support site online to view sales-i how to's, tips, tricks and best practices.

<https://support.sales-i.com>